



SAMS Reports



- Report Categories
 - Canned Reports
 - Opening a Report
- Report Configuration
 - Report Preview
 - Refresh Report
 - Printing Reports
- Report Definitions

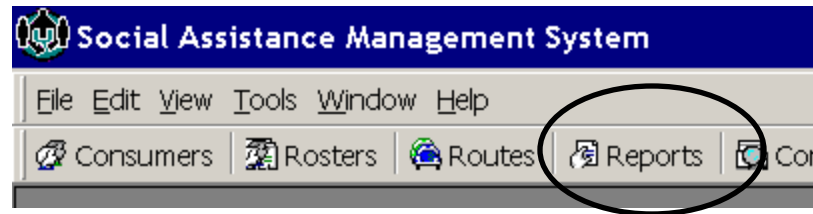


Reports

- This tutorial is for SAMS users who have, at least, a basic understanding of its functions
 - If you do not, please review the SAMS General Overview
- This tutorial is meant to give you an understanding of using Reports within SAMS

Reports

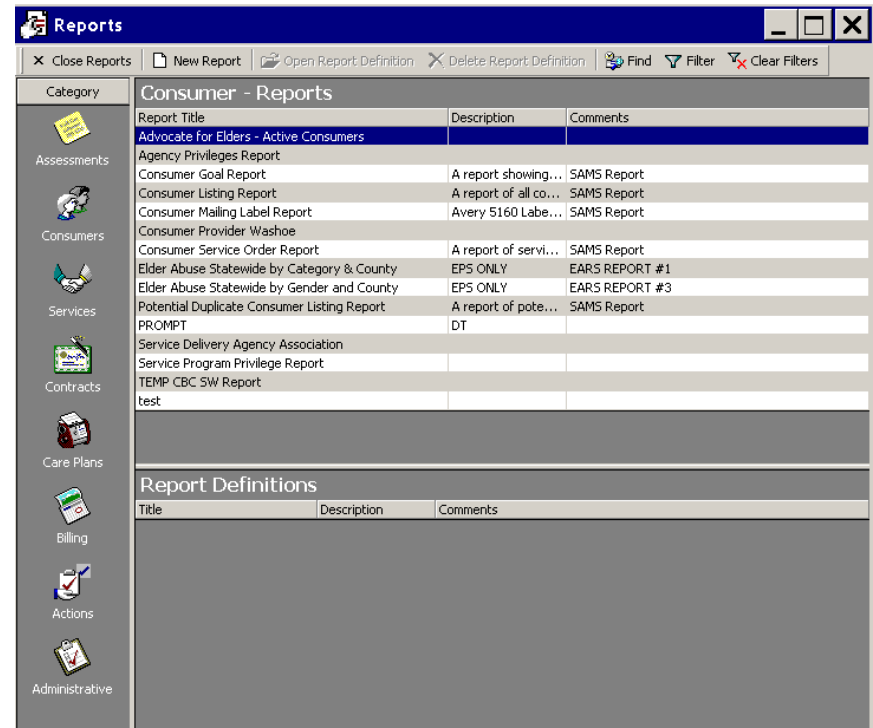
Starting



- Creating or running a report within SAMS is easy to do with just a few steps
- Let's start here by clicking on Reports (circled) from the main menu in SAMS

Reports

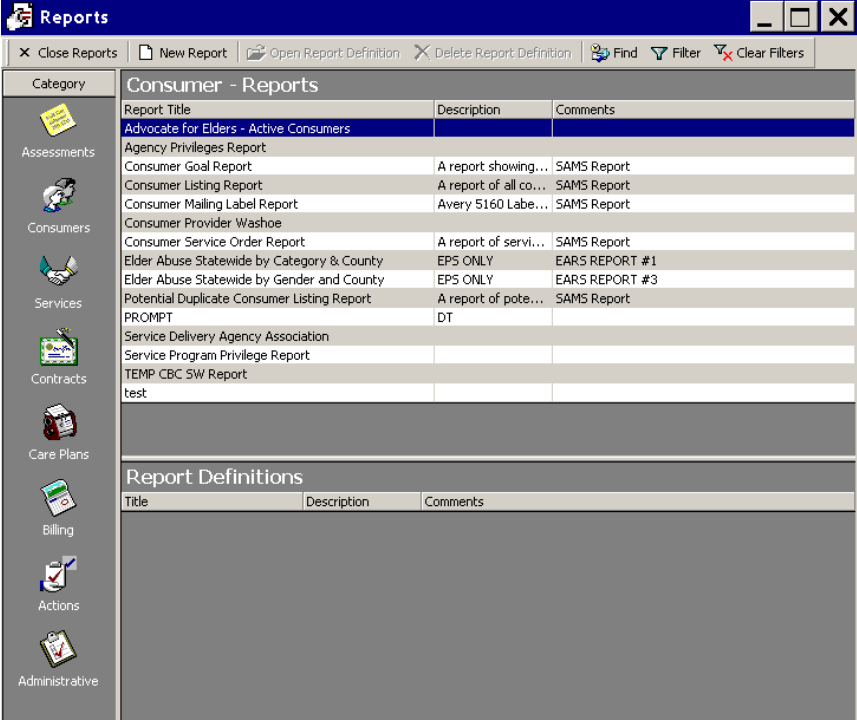
- Upon clicking Reports, a window similar to this will show up
- The contents may change as your administrator may add new reports to the menus
- Take a look at the icons on the left
 - Each one denotes a different category of reports



Reports

Categories

- Report categories include
 - Assessments
 - Consumers
 - Services
 - Contracts
 - Care Plans
 - Billing
 - Actions
 - Administrative
- Most reports will be in the Consumer category
 - The consumer category automatically opens when you open Reports



The screenshot shows the 'Reports' application window. The title bar reads 'Reports'. The menu bar includes 'Close Reports', 'New Report', 'Open Report Definition', 'Delete Report Definition', 'Find', 'Filter', and 'Clear Filters'. The main area is divided into two sections: 'Consumer - Reports' and 'Report Definitions'. The 'Consumer - Reports' section contains a table with columns for 'Report Title', 'Description', and 'Comments'. The 'Report Definitions' section contains a table with columns for 'Title', 'Description', and 'Comments'.

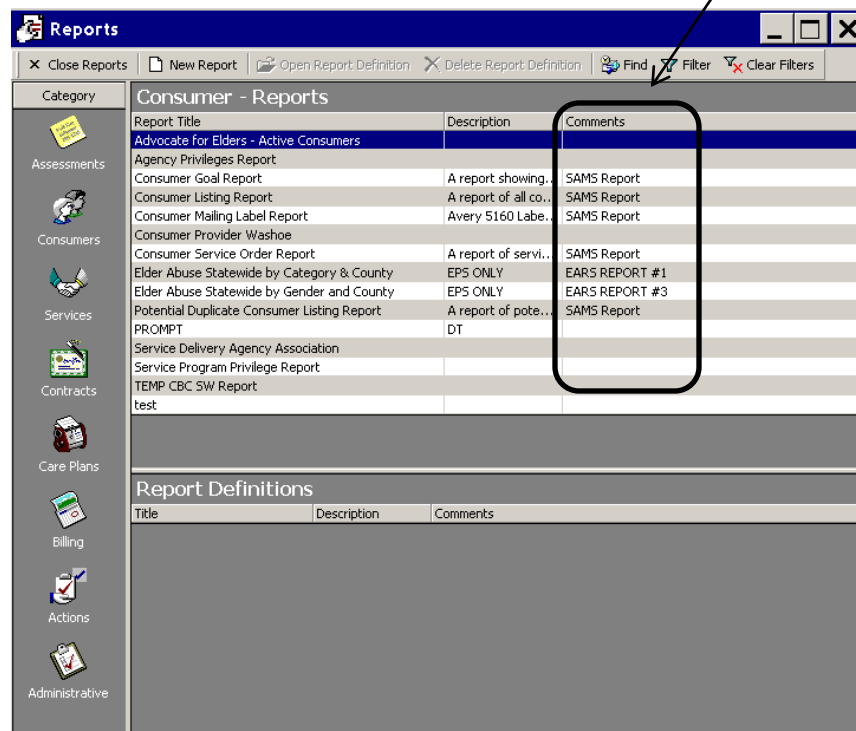
Report Title	Description	Comments
Advocate for Elders - Active Consumers		
Agency Privileges Report		
Consumer Goal Report	A report showing...	SAMS Report
Consumer Listing Report	A report of all co...	SAMS Report
Consumer Mailing Label Report	Avery 5160 Labe...	SAMS Report
Consumer Provider Washoe		
Consumer Service Order Report	A report of servi...	SAMS Report
Elder Abuse Statewide by Category & County	EPS ONLY	EAR5 REPORT #1
Elder Abuse Statewide by Gender and County	EPS ONLY	EAR5 REPORT #3
Potential Duplicate Consumer Listing Report	A report of pote...	SAMS Report
PROMPT	DT	
Service Delivery Agency Association		
Service Program Privilege Report		
TEMP CBC SW Report		
test		

Title	Description	Comments
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Reports

Canned or not Canned

- Let's take a closer look at the reports listed here
 - If you look at the comments column (arrowed), you see some reports have different entries
 - All reports that state “SAMS Report” are canned. Meaning those reports were created by Synergy
 - All reports that have anything else or nothing have been created by your SAMS administrator



The screenshot shows the 'Reports' application window. The main area displays a table of reports under the 'Consumer - Reports' category. The table has three columns: 'Report Title', 'Description', and 'Comments'. The 'Comments' column contains entries such as 'SAMS Report', 'EARS REPORT #1', 'EARS REPORT #3', and 'SAMS Report'. A black box highlights the 'Comments' column, and an arrow points to the 'Filter' button in the top toolbar.

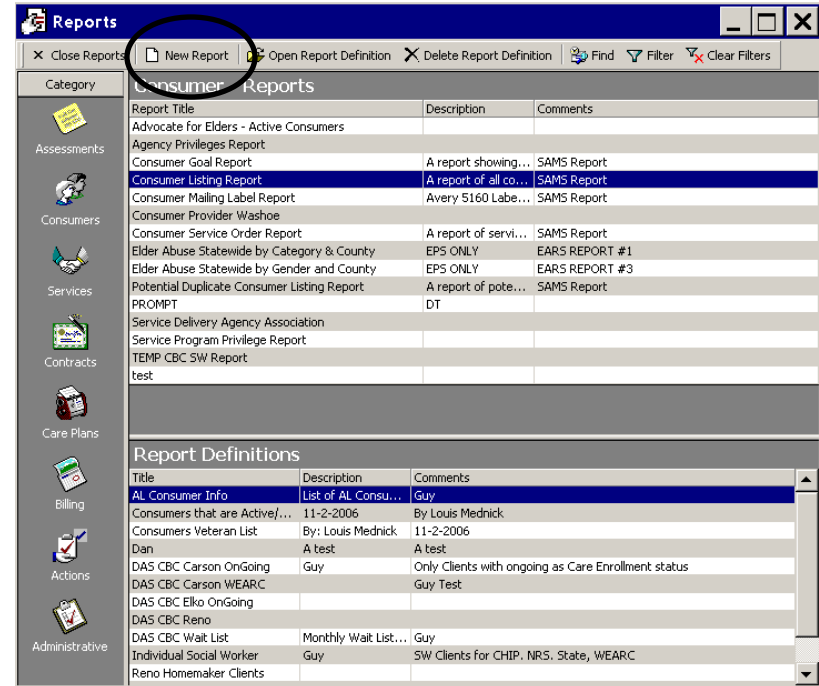
Report Title	Description	Comments
Advocate for Elders - Active Consumers		
Agency Privileges Report		
Consumer Goal Report	A report showing...	SAMS Report
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Consumer Mailing Label Report	Avery 5160 Labe...	SAMS Report
Consumer Provider Washoe		
Consumer Service Order Report	A report of servi...	SAMS Report
Elder Abuse Statewide by Category & County	EPS ONLY	EARS REPORT #1
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Potential Duplicate Consumer Listing Report	A report of pote...	SAMS Report
PROMPT	DT	
Service Delivery Agency Association		
Service Program Privilege Report		
TEMP CBC SW Report		
test		

Report Definitions		
Title	Description	Comments

Reports

Opening a Report

- Let's open the "Consumer Listing Report"
 - This report is very versatile
- Highlight the report and click on New Report (circled)
 - "Open Report Definition" will be discussed later on



Reports

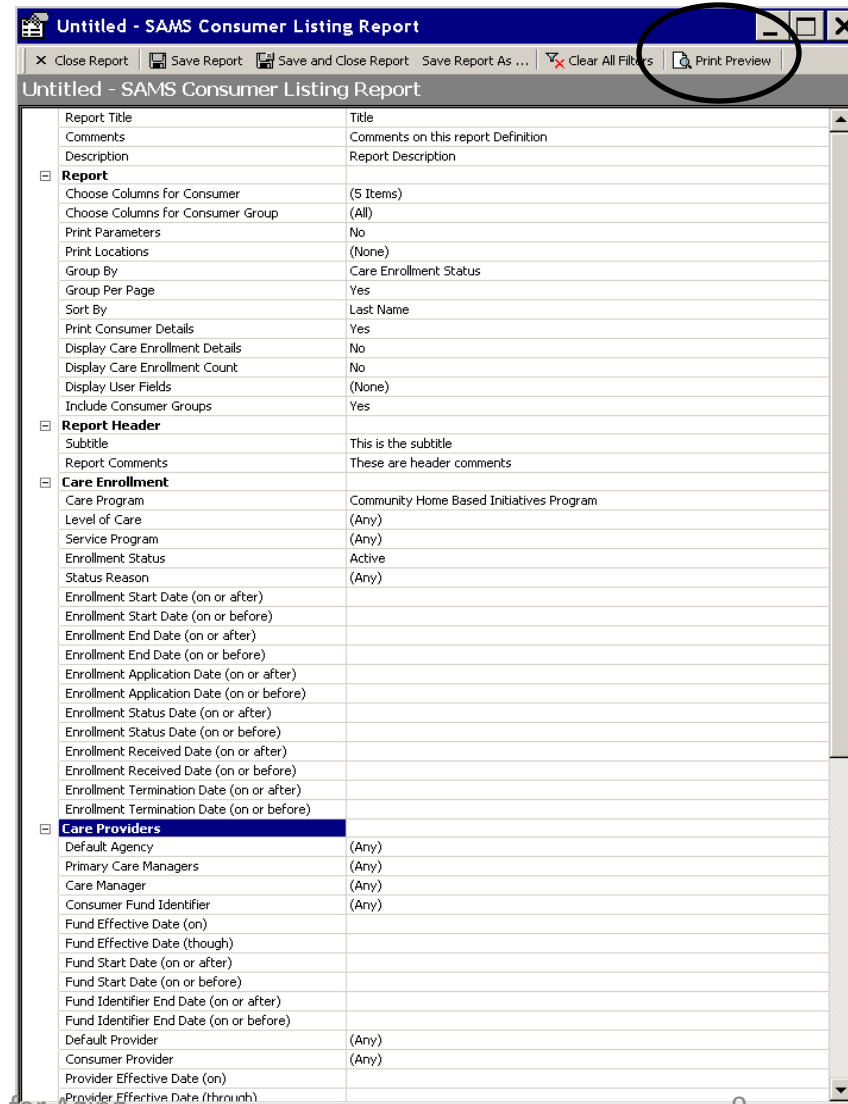
Configuration/Filtering/Settings

- Certain fields are not needed if you are not saving a report definition(fields circled)
 - Report Title
 - Comments
 - Description
- Report Configuration
 - Within the sections below, you can create a very complex report to show what you want
 - Choose Columns for Consumer
 - Allows you to pick and choose what columns you want to appear in the report
 - Choose Columns for Consumer Group is meant for use with Consumers Groups.
 - Most users will leave this be
 - These parameters continue on and are quite detailed
 - We will create a fairly simple report today.
 - I strongly suggest you try an experiment with various settings

Field Name	Value
Report Title	Title
Comments	Comments on this report Definition
Description	Report Description
Report	
Choose Columns for Consumer	(All)
Choose Columns for Consumer Group	(All)
Print Parameters	No
Print Locations	(None)
Group By	No Grouping
Group Per Page	No
Sort By	Client ID
Print Consumer Details	Yes
Display Care Enrollment Details	No
Display Care Enrollment Count	No
Display User Fields	(None)
Include Consumer Groups	Yes
Report Header	
Subtitle	
Report Comments	
Care Enrollment	
Care Program	(Any)
Level of Care	(Any)
Service Program	(Any)
Enrollment Status	(Any)
Status Reason	(Any)
Enrollment Start Date (on or after)	
Enrollment Start Date (on or before)	
Enrollment End Date (on or after)	
Enrollment End Date (on or before)	
Enrollment Application Date (on or after)	
Enrollment Application Date (on or before)	
Enrollment Status Date (on or after)	
Enrollment Status Date (on or before)	
Enrollment Received Date (on or after)	
Enrollment Received Date (on or before)	
Enrollment Termination Date (on or after)	
Enrollment Termination Date (on or before)	
Care Providers	

Reports

- This report I have setup is quite simple
 - The Report will return all consumers that are in CHIP with a Care Enrollment Status of Active
- After you have setup your report
 - Click on Print Preview (circled) to see how it will look



Reports

Preview Controls

The screenshot shows a report preview window titled "SAMS C...osting Report" dated "08/07/2007". The interface includes a "Preview" button, a zoom dropdown menu (set to 93%), a page navigation control (1 / 1), a search icon, and an export icon. The report content is a table with the following data:

SSN	Gender	DOB	Town of Residence
[REDACTED]	F	01/03/1914	Reno
[REDACTED]	F	01/15/1908	Las Vegas
[REDACTED]	M	01/19/1929	Las Vegas
[REDACTED]	F	01/22/1913	Reno
[REDACTED]	F	02/01/1940	Las Vegas
[REDACTED]	M	02/07/1926	Pahrump

1. By clicking on this dropped down box (arrowed), you can select what size you would like to zoom the report to
2. You can thumb through the pages of your report by clicking on the arrows or entering in the page number you would like to jump to (circled)
3. If you need to find some text or a person's name, clicking on the binoculars (squared) will allow you to search the report for a specific text item
4. The blue arrow denotes the report's Export feature
 1. Here you can export in various formats, including Adobe PDF, MS Excel and MS Word

Reports

Refresh Changes



- At times, you will Preview your report, to find out that the results that came back from SAMS wasn't what you were looking for
- SAMS allows you to make changes to the report and then “Refresh” the report to reflect the changes you just made
 - Go ahead and make a change to the report
 - Change the Care Program
 - Now, click on Refresh Report (circled)
 - The updated report with new information will be displayed

Reports

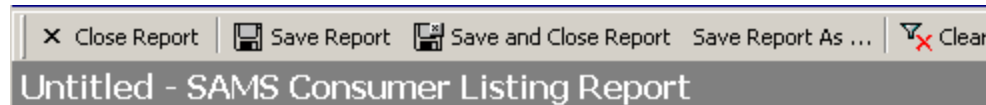
Printing



- If you are satisfied with the previewed report, you will now be able to print the report.
- To do this, click on Print Report (circled)
- This can take several second to a minute to respond since you are asking a remote server in Vermont to print here in Nevada. Please have patience
- A window will pop up asking you to verify your printer. Click on OK to proceed to print.

Reports

Save



- In some reports, you may have made many configurations and you will run this report every month. If this is the case, you should save this report definition
 - Report Definition: A configured report “template” that can be re-called and ran/printed at the users request
- Save Report & Save and Close Report uses those fields we discussed on page 8 (Title, etc...)
 - Name your report (give it a title) and then Save it

Reports

Definitions

- You may remember this figure to the right. I stated that I would cover Report Definitions
 - As you see, the definitions portion (circled) is quite large
 - Only save your definition if you will be using it on a Monthly basis or more than that!
 - If it only takes 20 seconds to create your report, please do not save your definition
 - SAMS has a limited amount of space for report definitions
 - Definitions, like consumers, does have a filter and find option so you can quickly identify your report and/or definition

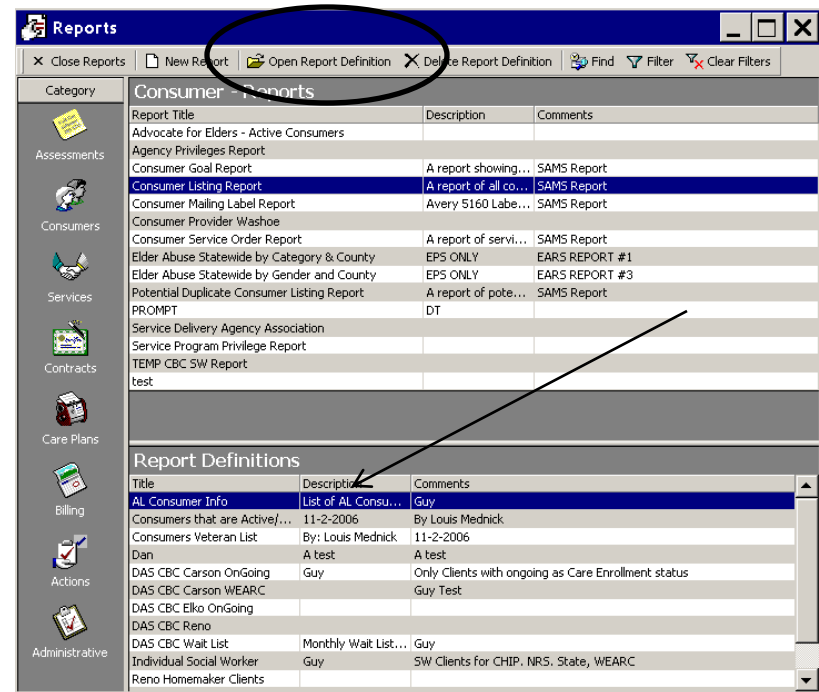
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PROMPT	DT	
Service Delivery Agency Association		
Service Program Privilege Report		
TEMP CBC SW Report		
test		

Title	Description	Comments
AL Consumer Info	List of AL Consu...	Guy
Consumers that are Active/...	11-2-2006	By Louis Mednick
Consumers Veteran List	By: Louis Mednick	11-2-2006
Dan	A test	A test
DAS CBC Carson OnGoing	Guy	Only Clients with ongoing as Care Enrollment status
DAS CBC Carson WEARC		Guy Test
DAS CBC Elko OnGoing		
DAS CBC Reno		
DAS CBC Wait List	Monthly Wait List...	Guy
Individual Social Worker	Guy	SW Clients for CHIP, NRS, State, WEARC
Reno Homemaker Clients		

Reports

Definition Editing

- To edit and/or modify a definition, highlight the definition (arrowed) and then click on “Open Report Definition”
 - This will open up the definition and allow you to edit it, just as you did on page 8-9



Reports

- If you feel that a report is not suitable for your needs and you need a custom report. Please look at other reports and report categories. If you still cannot find a suitable report for your unit and needs, contact your SAMS administrator.
 - Please be patient as report generation/creation is time consuming.
 - Your SAMS administrator will also review the existing reports for one that you may have over looked or wasn't configured appropriately.

Reports

Last Page

- You now have created a Report
- Previewed your Report within SAMS
- Made changes and Refreshed the Report
- Printed the Report
- Saved a SAMS Report Definition
- If you have any questions or would like something explained in greater detail, please contact your SAMS administrator for additional tutorials or instruction.